## SPEAKERS:

**JEROME A. DEENER**, co-chair of Fox Rothschild's Federal Estate and Gift Tax Planning practice, is a nationally recognized estate planning attorney and tax litigator. Jerome has appeared before the U.S. Tax Court in cases involving complex and timely estate and gift tax issues, has secured numerous notable Private Letter Rulings from the National Office of the IRS and has also been involved with innovative and significant tax techniques on behalf of clients. Among his honors, Jerome was listed as one of "Bergen's Top Lawyers" by *(201) The Best of Bergen Magazine* in 2012; was named "Hackensack Area Trusts and Estates Lawyer of the Year" by Best Lawyers in 2011; is rated "AV" by Martindale-Hubbell; is included in the list of "Top Tax Lawyers" in New Jersey by *New Jersey Monthly Magazine*, the list of "Top Lawyers" in the New York/New Jersey area by *New York Magazine*, the list of "Super Lawyers" by *New Jersey Monthly Magazine* and *Law & Politics Magazine* and the list of "The Best Lawyers in America" in the area of Trusts & Estates law. He was the 2005 recipient of the ICLE Distinguished Service Award for his many years of dedication and contributions to the field of continuing legal education. Jerome is quoted in *The New York Times, The Wall Street Journal* and *Forbes* Magazine discussing current tax issues. A frequent lecturer, he presents many programs on taxation and estate planning before the NJ ICLE and other professional groups as well as national institutions such as the NYU Institute of Taxation. He chaired the New Jersey Tax Day seminar and presented a seminar on 2011-2012 Estate Planning Opportunities sponsored by the NJ ICLE. An ACTEC Fellow and chair of its Business Planning Subcommittee, Jerome has also served as chair of the Fairleigh Dickinson Tax Seminar for the benefit of tax professionals in the Northern New Jersey region. Jerome has authored several editions of the *Estate Planning Strategist*, a treatise published by the ICLE, and has authored other articles on estate planning and tax topics for various publications. Jerome is a member of the Bergen County Bar Association (past chair of its Probate Committee), New Jersey State Bar Association, New York State Bar Association and American Bar Association and past chair of the Estate Planning Council of Bergen County.

**DEBRA T. HIRSCH** has more than 30 years of tax law experience representing clients in federal and state gift and estate tax planning, charitable planning, preparation of wills and trusts and estate administration. Debra is a sought-after lecturer on various tax law-related topics and has presented before professional groups on sophisticated gift and estate tax planning, closely held family businesses, and trusts and estates topics. Debra co-authored the fourth edition of the *Estate Planning Strategist*, a treatise published by the ICLE, and has authored articles on estate planning and tax topics for various publications.

Among her honors, she is rated "AV Preeminent" by Martindale-Hubbell; was listed as one of "Bergen's Top Lawyers" by *(201) The Best of Bergen Magazine* in 2012; and was included in the list of "SuperLawyers" by *New Jersey Monthly Magazine* and *Law & Politics Magazine* in 2011. Debra is a fellow of the ACTEC and a member of the Bergen and Essex County Bar Associations and New Jersey State Bar Association.

**ADAM M. GRENKER** focuses his practice on sophisticated estate planning; estate and trust administration; federal estate, gift and income taxation; living trusts; tax matters of nonprofit organizations and charitable planning; and business succession planning. A frequent author and lecturer, he has contributed to numerous articles on tax law and co-authored the fourth edition of the *Estate Planning Strategist*, a treatise published by the NJ ICLE. Adam has presented various seminars on tax and financial planning and was selected in 2013, 2012 and 2010 as a "New Jersey Rising Star" by *New Jersey Monthly Magazine* and *Law & Politics Magazine*. He is a member of the American Bar Association and New York State Bar Association and is on the Board of Consultors of the Real Property, Trust & Estate Law Section of the New Jersey State Bar Association.

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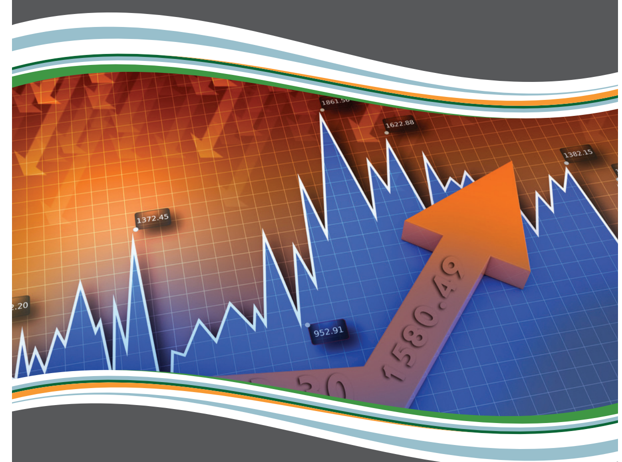


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All programs in the series, excluding the auditing sessions, are eligible for CLE credit in New Jersey and Pennsylvania and reciprocal credit in New York. Detailed credit information will be available closer to the date of the actual program.

## Scheduled Monday Sessions

**Dates:** September 22 (3 tax credits)
October 20 (3 credits)
November 17* (auditing – 2 credits)
May 18 (3 credits)

**Time:** 5:30 to 8 p.m.

**Special auditing session for accountants only (5:30 to 7:30 p.m.)*

A light dinner and hors d'oeuvres will be served at each session.

## Location:

**Fox Rothschild LLP**
**75 Eisenhower Parkway**
**Suite 200**
**Roseland, NJ 07068-1600**

For questions or more information on these programs, please contact **Kaytlynn Gorson** at **215.299.3807** or **events@foxrothschild.com.**

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These courses are designed to cover practical and timely applications of topics relevant to the legal, accounting and financial planning practices. Practical planning, drafting and compliance considerations will be discussed. One session involving auditing issues for accountants is scheduled to be conducted in November by a qualified CPA.

Detailed outlines, drafting samples (where relevant) and tax return examples are distributed at each session. Ample opportunity exists for questions and answers, as well as an exchange of ideas among fellow professionals.

**Anticipated topics include:**

- Recent tax cases, rulings and regulations of interest, resulting in new planning options and pitfalls
- When qualified plan assets and IRAs are protected in bankruptcy and when they are not
- Newest techniques to juxtapose interrelationship among federal and state income tax, and federal and state estate tax; where and how to focus on the optimal tax savings plan
- Tax return preparation to enhance successful audit results
- Use of Beneficiary Defective Income Trusts (BDITs) to maximize income and estate and gift tax benefits
- Planning for the terminally ill and what to do, legally speaking, if a client survives expected shortened life expectancy and potential ruination of the plan
- Audit sessions (accountants only)

## Registration Form

**There is no fee to attend this year's seminar series.**

**To sign up online visit:**
www.foxrothschild.com/TaxSeminarRSVP

**Send registration form to:**
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**Attn: Kaytlynn Gorson**
2000 Market Street, 20th Floor
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**2014-2015**
**Registration Form**
**Tax and Financial Planning Seminar Series**

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